CREATING A PORTFOLIO IN BLOOMBERG

1) Hit <Client> (in the Yellow keys) or Type “PRTU” and hit <Go>

2) Type 1 <Go> or click on “ Creating and Updating Portfolio”

3) On the new screen click on “Creating a Portfolio”

4) Now you are on portfolio creating screen. Type your portfolio name in the “Portfolio Name” window (the orange window)

5) Enter Cash Amount in the “Cash” window

6) Hit <GO>

7) Notice on the top right of the page that the page number indicates “1/2”. Hit<Page Fwd> to go onto the next page.

8) This page allows you to enter the stocks in your portfolio by ticker symbol, the cost price per unit and the number of units or position.
   Enter the stock name as “Ticker symbol” “US” <Equity> (the yellow key).

   Enter “Position” as the number of stocks. Enter the “Cost per Unit”. Hit <GO>.

   For the correct entries you should be able to see the identification number filled in automatically by the system. This confirms that your stock is recognized by the system.

   Also when you hit <Go> you will notice the “Updated” word on the Top left hand side.

9) Hit <Menu> to return to the main screen under Client portfolio management.

10) Click on “Finding and Analyzing Portfolio” to view your portfolio. Alternately type “PLST” and hit <GO> to enter the screen that displays a list of your portfolios.

11) Click on the Portfolio name that you wish to view and analyze. This will take you to a list of actions that you can do with the selected portfolio.